



**Director's Station Overview  
Training Guide  
(Version 3.1.10.7.1)**

DOC-DROTGEN-ALL

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# Introduction

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## *Training Overview*

### Who should attend?

This course is intended for users with Director's Station logins.

### Prerequisite

No class is required; however, it is recommended that participants review the Director's Station CD before attending this class.

### Course Goals

After completing this course, participants will be able to:

- Distinguish between the different components of the SwiftView
- Access the categories within the Popout Menu Bar and know what is represented in each of them
- Understand how to create a report using dimensions and measures
- Understand how to create a chart and an alert
- Manage documents and saved applications within the Director's Station My Folder



# Director's Station Overview

## User Access

You can access Director's Station using a URL with the pattern <http://IPaddress/directorsstation>. If your network uses internal IPs, use the internal IP address to access Director's Station.

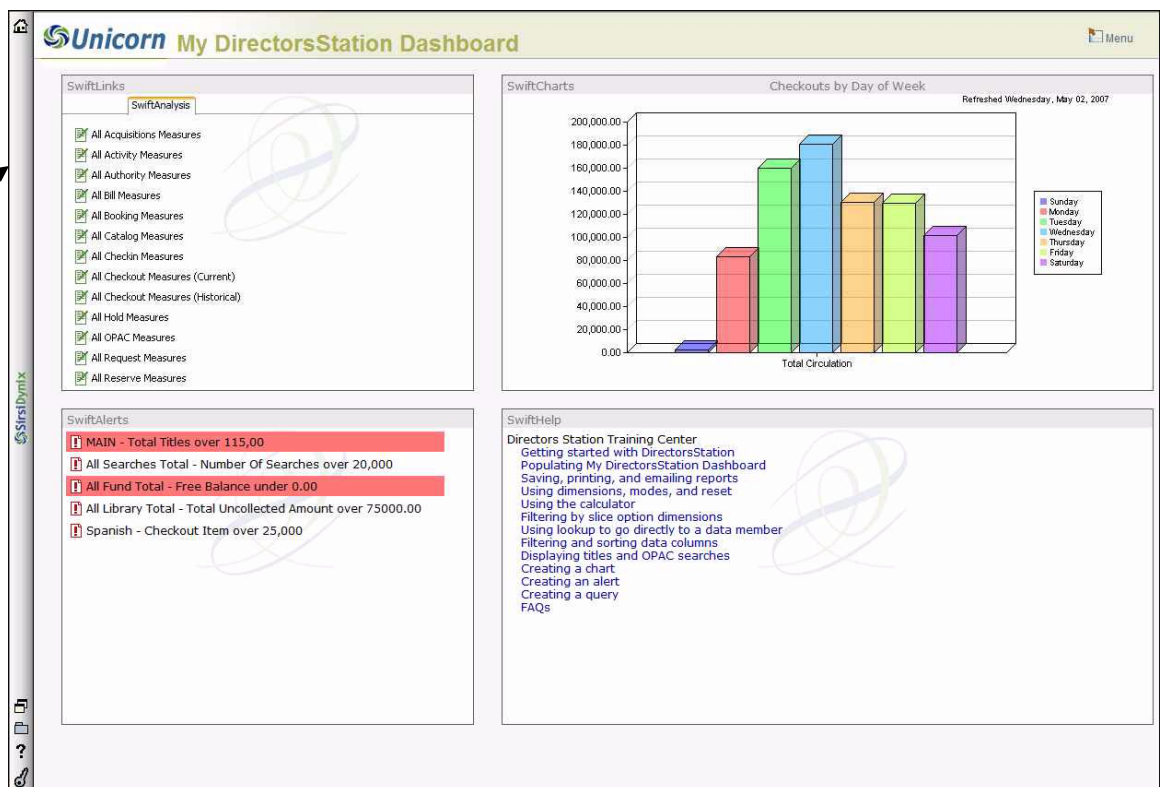
## Users and Passwords

Your user name and password will be provided to you by the system administrator.

You will either be prompted by the system to change your password after a set time interval or you can change your password at any time using My Profile, which is discussed on page 29. The system administrator will determine whether or not the system prompts users to change passwords.

## Dashboard and Popout Menu





Popout Menu Bar

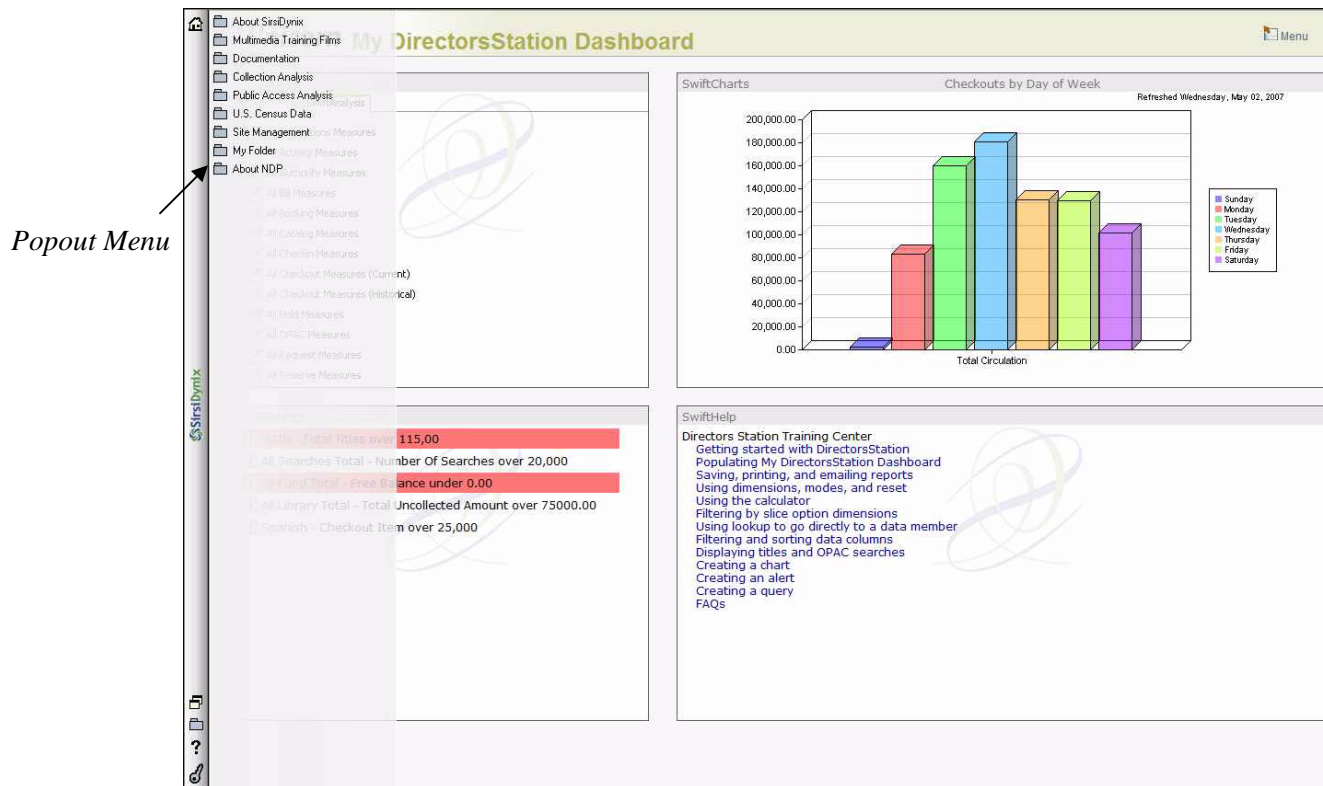


The Dashboard is the starting point for collection analysis. The Dashboard is divided into the following sections:

- **SwiftAnalysis** – A list of delivered and customized reports
- **SwiftAlerts** – Notifications for data that has crossed a set threshold
- **SwiftCharts** – Graphs created from reports
- **SwiftHelp** – A list of training films delivered to assist in working with Director's Station

## Popout Menu Bar

Icon	Description
	<b>Home</b> – Click this icon at any time to return to your Dashboard.
	<b>Manage My Folder</b> – Allows you to upload, organize, and manage your documents, reports, charts, alerts, and queries.
	<b>Help</b> – There are currently no pre-packaged help files. Please refer to the Director's Station CD or this training guide for help.
	<b>Log Off</b> – Click this icon to exit Director's Station.



The Popout Menu includes the following folders or categories:

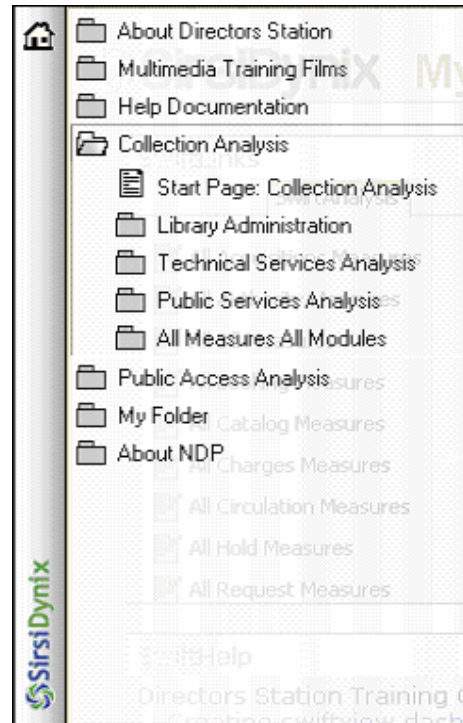
- **About Directors Station** – This section contains a short introduction to the purpose of Director's Station.
- **Multimedia Training Films** – View these instructional films to learn how to use Director's Station. These films are also found on your Director's Station CD.
- **Help Documentation** – See the Director's Station CD for help.
- **Collection Analysis** – This folder contains reports designed to access your Unicorn data.
- **Public Access Analysis** – This folder contains information about iBistro searches. In a future release, it will also contain information about other user initiated functions such as online renewals and access to online databases.
- **My Folder** – Use this folder to organize customized reports, alerts, links and documents.
- **About NDP** – The Normative Data Project is available to all Director's Station customers. Contact SirsiDynix Client Care if you do not know your login.



# Reports

---

Within the Popout Menu Bar, the reports are organized in three folders.



- **Technical Services Analysis** – contains reports related to the technical service activities in the library such as acquisitions, authority, cataloging, and serials
- **Public Service Analysis** – contains reports related to circulation activities in a library such as bills and fines, circulation, holds and requests, materials booking, reserves and users
- **All Measure All Modules** – contains reports for every cube within Director's Station; these reports have all possible measurements or calculations in each report

## Inside a Report

A report includes the following components.

**Dimensions**

**Measures**

**Report Name**

**Report Area**

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATELAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
HYDER	60	0.26%	482		126			1,761	0.35
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

- **Report name** – is seen in the left-hand corner of each report
- **Dimensions** – very similar to selection criteria in WorkFlows, dimensions are used to obtain the correct data
- **Measures** – are numeric values that give a count, total, average, or percentage; measures can be values drawn from Unicorn that Director's Station calculates for you
- **Dimension pool** – is the box in which the dimensions live
- **Report area** – is the section below the data pool where the data is calculated and arranged

## Using Reports

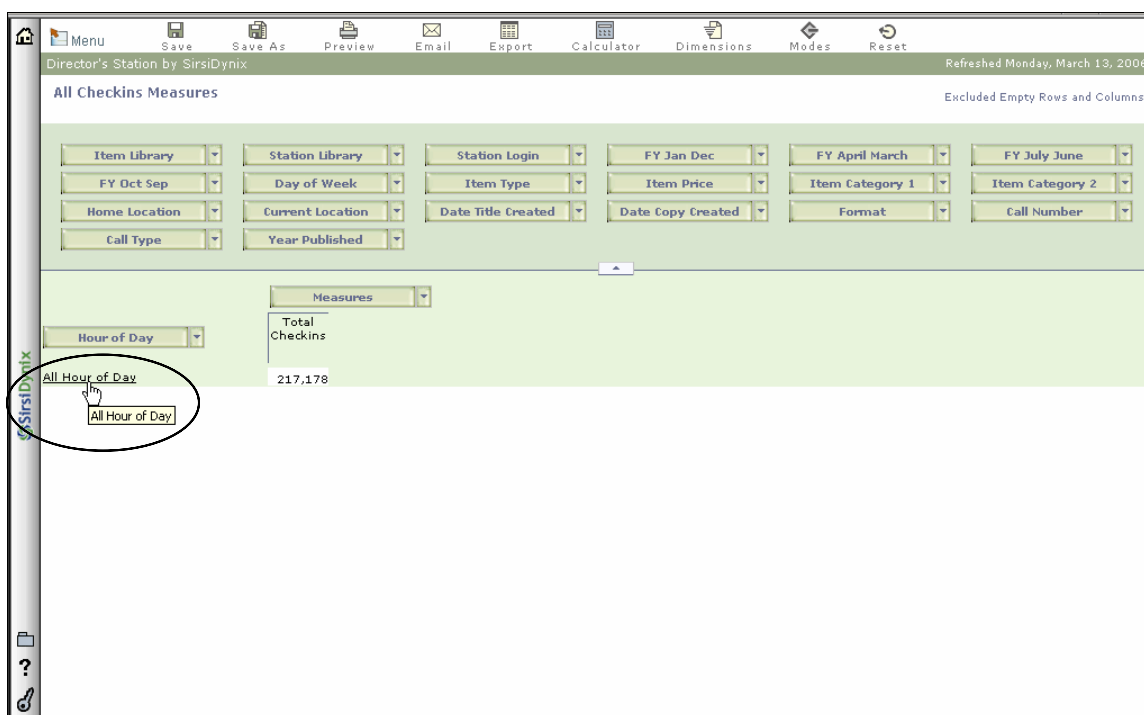
There are different ways to use the dimensions in a Director's Station report in order to obtain the information you need.

- View totals for a report or view numbers for individual components of a report
- Filter a report in the report area
- Filter a report in the dimension pool
- Drag dimensions into the report area

The following examples use the All Checkins Measures report.

### Viewing Totals

To see all hours of the day rather than a total, click on **All Hour of Day**.



The dimension expands to display every hour of the day represented.

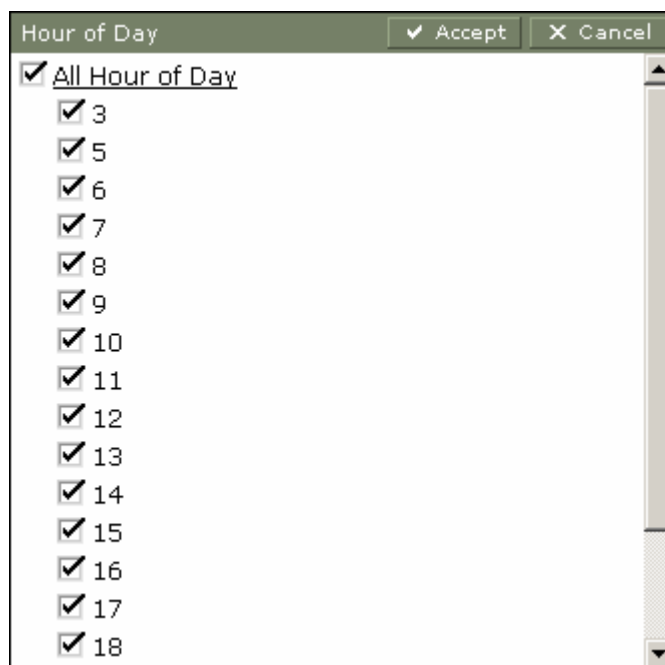
Hour of Day	Total Checkins
All Hour of Day Total	217,178
3	151
5	2
6	106
7	2,095
8	36,334
9	21,142
10	22,636
11	18,727
12	20,167
13	17,414
14	18,089
15	17,776
16	17,655
17	9,429
18	8,030
19	3,598

## Filter a Report in the Report Area

You can filter a dimension while in the report area to see a few particular hours of the day.

1. Click the arrow next to the dimension in the report area.

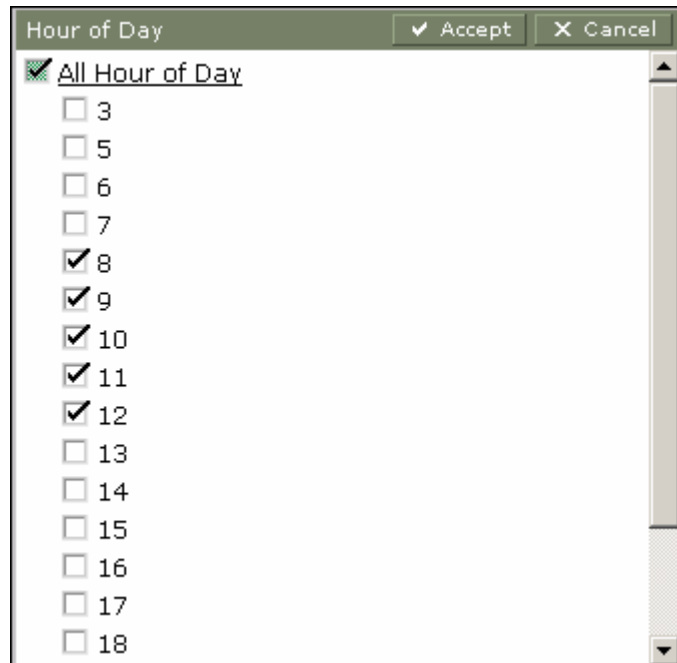
2. Click **All Hour of Day**.



A dialog box titled "Hour of Day" with "Accept" and "Cancel" buttons. It contains a list of options, all of which are checked. The options are:

- ☒ All Hour of Day
- ☒ 3
- ☒ 5
- ☒ 6
- ☒ 7
- ☒ 8
- ☒ 9
- ☒ 10
- ☒ 11
- ☒ 12
- ☒ 13
- ☒ 14
- ☒ 15
- ☒ 16
- ☒ 17
- ☒ 18

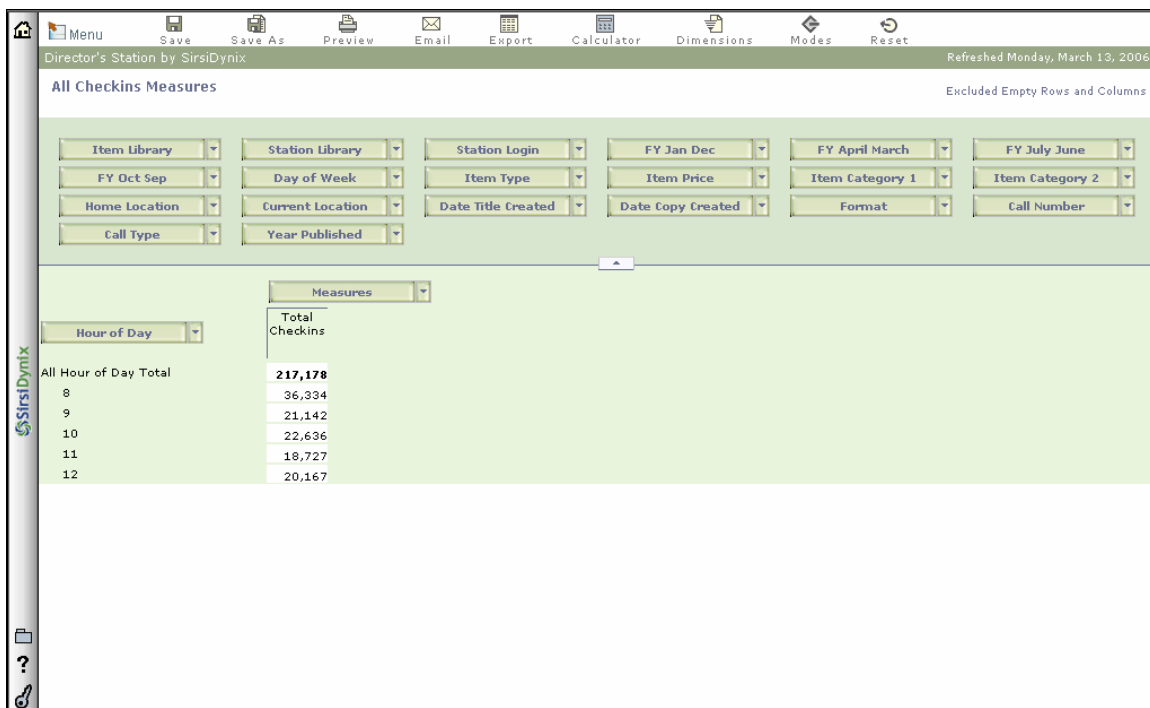
3. Clear the box next to **All Hour of Day**.
4. Click **All Hour of Day**.
5. Select the particular hours you want to view in the report.



The 'Hour of Day' dialog box is shown with a list of hours from 3 to 18. The 'All Hour of Day' checkbox is checked. The hours 8, 9, 10, 11, and 12 are also checked.

Hour	Selected
All Hour of Day	Yes
3	No
5	No
6	No
7	No
8	Yes
9	Yes
10	Yes
11	Yes
12	Yes
13	No
14	No
15	No
16	No
17	No
18	No

6. Click **Accept**. The report changes to reflect the selected hours.



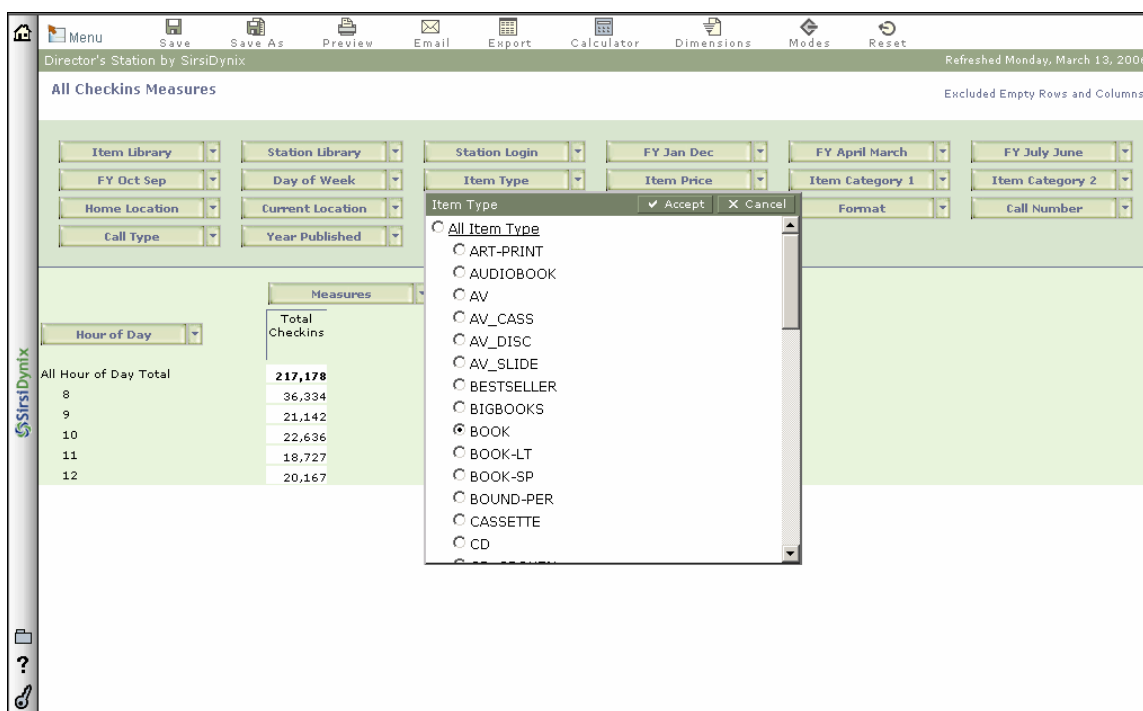
The Director's Station interface shows the 'All Checkins Measures' report. The 'Hour of Day' dropdown is set to 'All Hour of Day'. The 'Measures' dropdown is set to 'Total Checkins'.

Hour of Day	Total Checkins
All Hour of Day Total	217,178
8	36,334
9	21,142
10	22,636
11	18,727
12	20,167

## Filter a Report in the Dimension Pool

You can replace default dimensions in a report by clicking and dragging a dimension from the dimension pool to the report area.

As a default, when the dimensions live in the pool, they are set to All. You can only select one or all when the dimension lives in the pool.



In order to select more than one item type, drag the dimension into the report area and go through the steps given for filtering a report in the report area on page 10.

## Dragging Dimensions into the Report Area

You can customize a complex report by switching dimensions.

1. Click and drag the dimension you want to display to the report area.
2. Position the new dimension over the existing dimension, so that the box containing **Swap** appears.

Director's Station by SirsiDynix Refreshed Monday, March 13, 2006

All Checkins Measures Excluded Empty Rows and Columns

Measures

Total Checkins

217,178
36,334
21,142
22,636
18,727
20,167

- Release the new dimension. It will replace the existing dimension in the report area, and the old dimension is moved back to the dimension pool.

Director's Station by SirsiDynix Refreshed Monday, March 13, 2006

All Checkins Measures Excluded Empty Rows and Columns

Item Library	Station Library	Station Login	FY Jan Dec	FY April March	FY July June
FY Oct Sep	Hour of Day	Item Type	Item Price	Item Category 1	Item Category 2
Home Location	Current Location	Date Title Created	Date Copy Created	Format	Call Number
Call Type	Year Published				

Measures

Day of Week

All Day of Week

Total Checkins

217,178

- Click the new dimension's down arrow.

Director's Station by SirsiDynix Refreshed Monday, March 13, 2006

All Checkins Measures Excluded Empty Rows and Columns

Item Library	Station Library	Station Login	FY Jan Dec	FY April March	FY July June
FY Oct Sep	Hour of Day	Item Type	Item Price	Item Category 1	Item Category 2
Home Location	Current Location	Date Title Created	Date Copy Created	Format	Call Number
Call Type	Year Published				

Measures

Day of Week

Day of Week

- ☒ All Day of Week
- ☒ Sunday
- ☒ Monday
- ☒ Tuesday
- ☒ Wednesday
- ☒ Thursday
- ☒ Friday
- ☒ Saturday

Total Checkins

217,178

## 5. Make changes to the check boxes that are selected.

Director's Station by SirsiDynix Refreshed Monday, March 13, 2006

All Checkins Measures Excluded Empty Rows and Columns

Item Library Station Library Station Login FY Jan Dec FY April March FY July June  
FY Oct Sep Hour of Day Item Type Item Price Item Category 1 Item Category 2  
Home Location Current Location Date Title Created Date Copy Created Format Call Number  
Call Type Year Published

Measures

Day of Week

Day of Week

✓ Accept X Cancel

☒ All Day of Week  
☒ Sunday  
☐ Monday  
☐ Tuesday  
☐ Wednesday  
☐ Thursday  
☐ Friday  
☒ Saturday

6. Click **Accept**. The new report appears.

Director's Station by SirsiDynix Refreshed Monday, March 13, 2006

All Checkins Measures Excluded Empty Rows and Columns

Item Library Station Library Station Login FY Jan Dec FY April March FY July June  
FY Oct Sep Hour of Day Item Type Item Price Item Category 1 Item Category 2  
Home Location Current Location Date Title Created Date Copy Created Format Call Number  
Call Type Year Published

Measures










Day of Week

Day of Week

Sunday 532  
Saturday 27,396

## Reports Toolbar

When working within a report, a toolbar displays that may be used to manage your customized report.

Icon	Description
	<b>Save</b> – Allows you to save the report to My Folder and/or your Dashboard.
	<b>Save As</b> – Allows you to save the report to My Folder and/or your Dashboard.
	<b>Preview</b> – Allows you to see a print preview of the report, change attributes such as paper size and layout, and print the report.
	<b>Email</b> – Allows you to e-mail a report link to another user.
	<b>Export</b> – Allows you to export or download the data currently being viewed as a Comma Separated Value (.csv) file. This file format may be opened in various spreadsheet and database applications.
	<b>Calculator</b> – Allows you to create new measures on-the-fly to provide additional information in a report view.
	<b>Dimensions</b> – Allows you to add or remove dimensions from the available list in the Slice Options area.
	<b>Modes</b> – Allows you to change global attributes to the report view.
	<b>Reset</b> – Allows you to discard all changes and reset the report to its original state.



# Charts

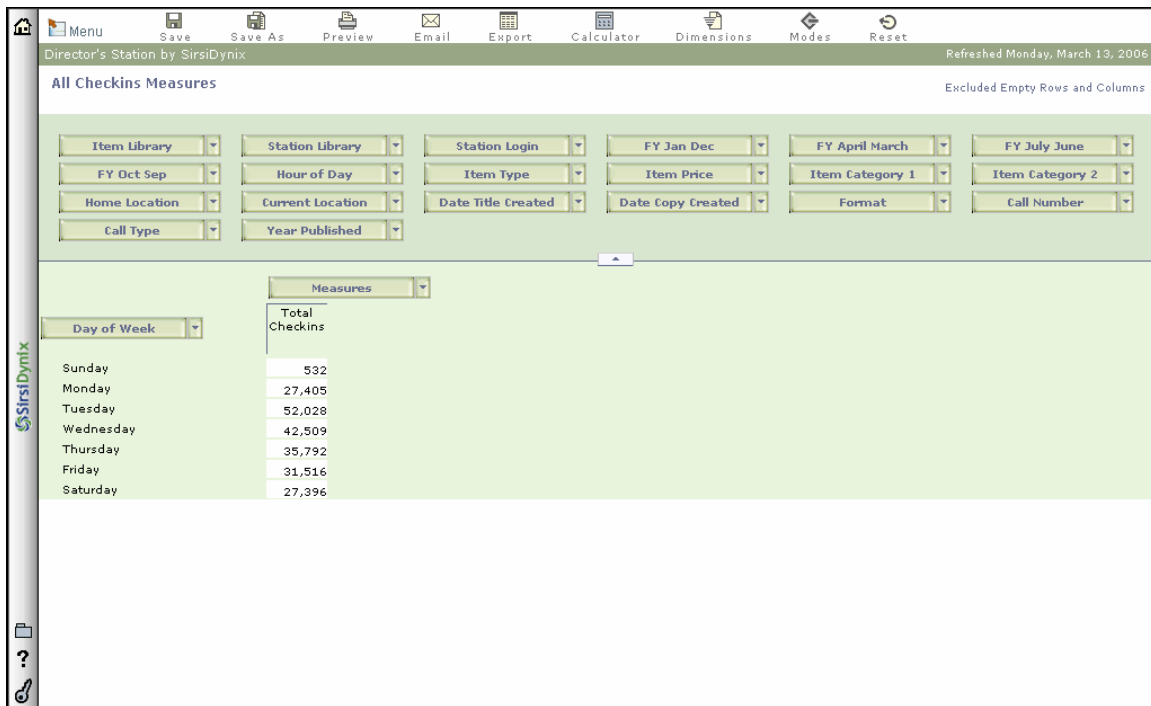
Charts give the user the ability visually analyze the data contained in reports. The user can highlight individual dimensions and measures to use within the chart.

## Creating Charts

Charts are created based on the data in a report.

### *To create a chart*

1. Click to open an existing report.



2. Highlight data cells by positioning your cursor at the upper left corner of the first cell and dragging it to the lower right corner of the last:

Director's Station by SirsiDynix

Refreshed Monday, March 13, 2006

All Checkins Measures

Excluded Empty Rows and Columns

Item Library Station Library Station Login FY Jan Dec FY April March FY July June

FY Oct Sep Hour of Day Item Type Item Price Item Category 1 Item Category 2

Home Location Current Location Date Title Created Date Copy Created Format Call Number

Call Type Year Published

Measures

Day of Week

Day of Week	Total Checkins
Sunday	532
Monday	27,405
Tuesday	52,028
Wednesday	42,509
Thursday	35,792
Friday	31,516
Saturday	27,396

Director's Station by SirsiDynix

Refreshed Monday, March 13, 2006

All Checkins Measures

Excluded Empty Rows and Columns

Item Library Station Library Station Login FY Jan Dec FY April March FY July June

FY Oct Sep Hour of Day Item Type Item Price Item Category 1 Item Category 2

Home Location Current Location Date Title Created Date Copy Created Format Call Number

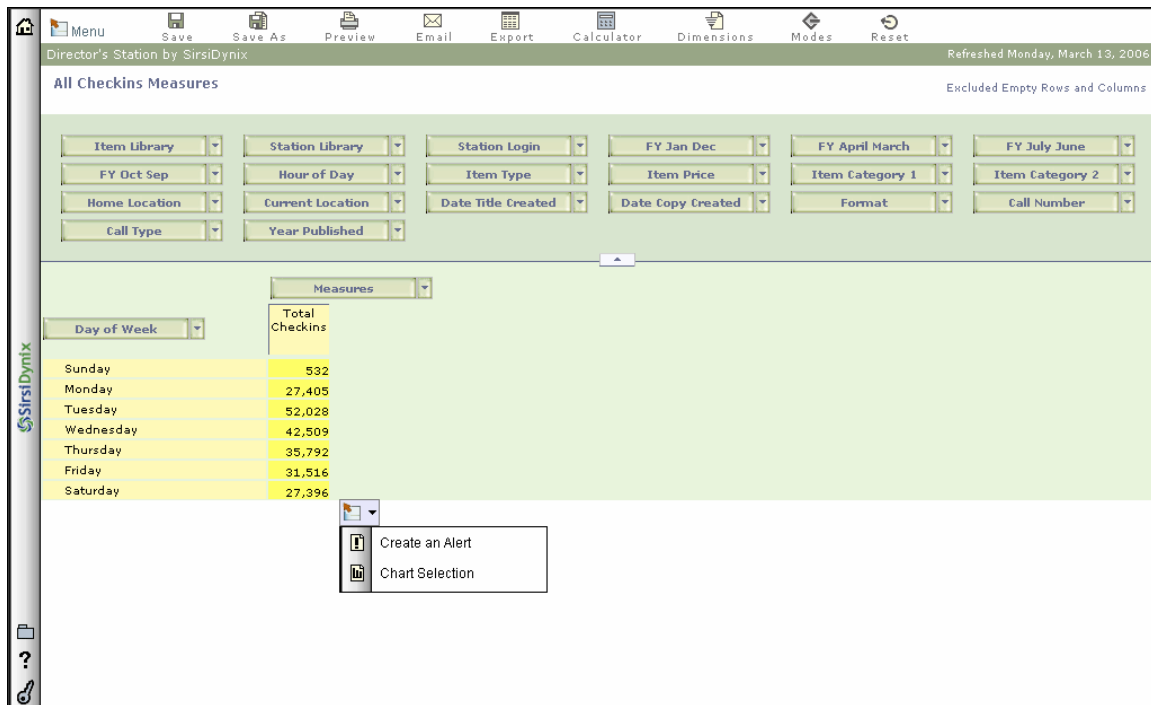
Call Type Year Published

Measures

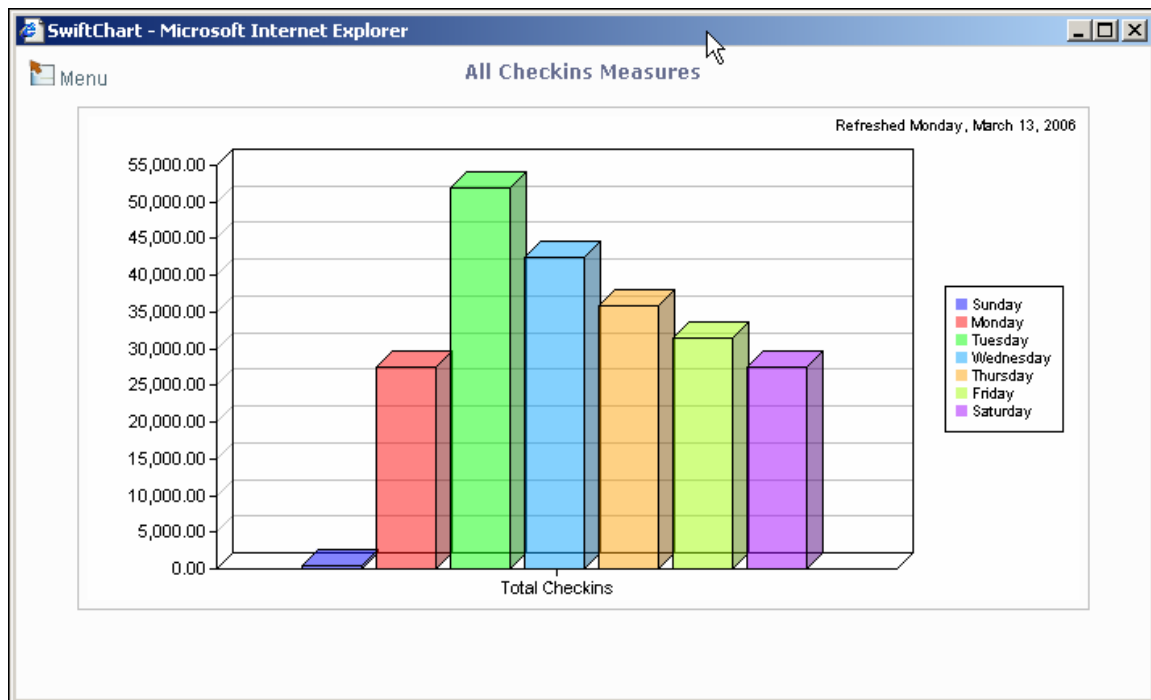
Day of Week

Day of Week	Total Checkins
Sunday	532
Monday	27,405
Tuesday	52,028
Wednesday	42,509
Thursday	35,792
Friday	31,516
Saturday	27,396

3. When you release the mouse, a menu will appear:



4. Click on the **Chart Selection** option to put the data you have selected into chart form. Charts can only be saved to My Folder or My SwiftView or they can be emailed. Charts cannot be downloaded or printed.





# Automatic Alerts

When you view a report, you may find that a single measure is very important, and should therefore be flagged for alert analysis. Alerts allow you to determine whether you have gone over or under a threshold value. Alerts are saved only to your SwiftView Dashboard and not to any public folders.

## Creating automatic alerts

Alerts are created in the same way as charts.

### To create an alert

1. Click on a cell to highlight it. After highlighting the cells, the Select menu appears:

The screenshot displays the 'Directors Station by SirsiDynix' application. At the top is a menu bar with options: Menu, Save, Save As, Preview, Email, Export, Calculator, Dimensions, Modes, and Reset. Below the menu bar, the title bar reads 'Directors Station by SirsiDynix' and the status bar indicates 'Refreshed Tuesday, April 18, 2006'. The main content area is titled 'All Acquisitions Measures' and includes a section for filters with dropdown menus for Account Number, Fund Level 1-4, Fiscal Cycle, FundCyc Library, Call Number, Call Type, Item Category 1-2, Home Location, ItemType, Library, Title Catalog Format, Vendor, Vendor Group 1-2, Vendor Group 3, Date Paid, Date Ordered, and Order Type. Below the filters is a table with columns: Fund, Amount Budgeted, Amount Encumbered, Amount Invoiced, Cash Balance, Free Balance, Amount Paid, Fundings Paid, Copies Ordered, Copies Funded, Copies Received, Copies Paid, and V/O. The table lists various acquisition categories such as ADULT, ADULTFIC, ARCH, ART, ARTIST, AV, BIGBUDGET, BIO, BOOK, CATHY, CHAMELEON, CHEMBOOK, CHERYL'S, COMM, CONSULTING, and CURRENT2. A context menu is open over the 'Free Balance' cell for the 'ADULT' row, showing options: 'Create an Alert', 'Chart Selection', and 'List Funded Titles'.

Fund	Amount Budgeted	Amount Encumbered	Amount Invoiced	Cash Balance	Free Balance	Amount Paid	Fundings Paid	Copies Ordered	Copies Funded	Copies Received	Copies Paid	V/O
ADULT	639,496.00	1,161.50	237.18	639,258.63	637,859.00	237.37	76.54	209	1,985	42	10	
ADULTFIC	124,444.00	.00	0.00	124,444.00	124,444.00							
ARCH	504,624.00	30.00	105.25	504,474.00	504,338.00				18	5	1	
ART	5,010.00	350.15	0.00	5,010.00	4,659.00				57			
ARTIST	.00	.00	0.00	.00	.00				1			
AV	350,445.00	1,830.40	368.05	349,677.00	347,478.00				491	7		
BIGBUDGET	200,514,444.00	.00	0.00	200,514,444.00	200,514,444.00							
BIO	600,101.00	499.99	99.75	599,861.00	599,261.26	240.00	240.00	65	81	21	2	
BOOK	644,230.00	6,188.03	3,112.77	642,341.86	633,041.06	1,888.14	1,287.36	1,910	26,999	760	50	
BOOK	230.00	.00	0.00	230.00	230.00		0.00	1	1			
CATHY	1,014,999,999.99	175.90	0.00	1,014,999,876.59	1,014,999,700.69	123.40	98.45	11	11	6	7	
CHAMELEON	-1.00	.00	0.00	-1.00	-1.00							
CHEMBOOK	.00	.00	-500.00	.00	500.00							
CHERYL'S	1,000.00	220.20	0.00	1,000.00	779.80		0.00	2	2			
COMM	1,189,999,999.80	213.00	0.00	1,189,999,999.80	1,189,999,786.80		0.00	3	3	2		
CONSULTING	47,645.00	8.75	0.00	47,645.00	47,636.25		0.00	1	1			
CURRENT2												

3. Click **Create an Alert**.

Save Alert As

Alert Name:  
ADULT - Free Balance over 637,859.95

Save in Folder: My Folder

Add to SwiftLinks: Yes

Trigger an Alert when:  
ADULT  
Free Balance

are over 637,859.95

4. Change the **Alert Name**.
5. Use the drop-down arrow to change **over/under**.
6. Change the amount.
7. Click **Accept**. The Alert will appear on your Dashboard. The alert will also appear in the Alert section of your dashboard and will appear red when the threshold has been met or if it has been exceeded.

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<b>Note</b>	The alerts <b>must be</b> saved to SwiftLinks and My Folder in order for them to appear on the dashboard.
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# My Folder

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You can upload, organize, and manage documents and reports from Manage My Folder in Director's Station. My Folder is a personal folder that no other person can access without your username and password. All of your information regarding reports and alerts are saved here, as well as other possible links.

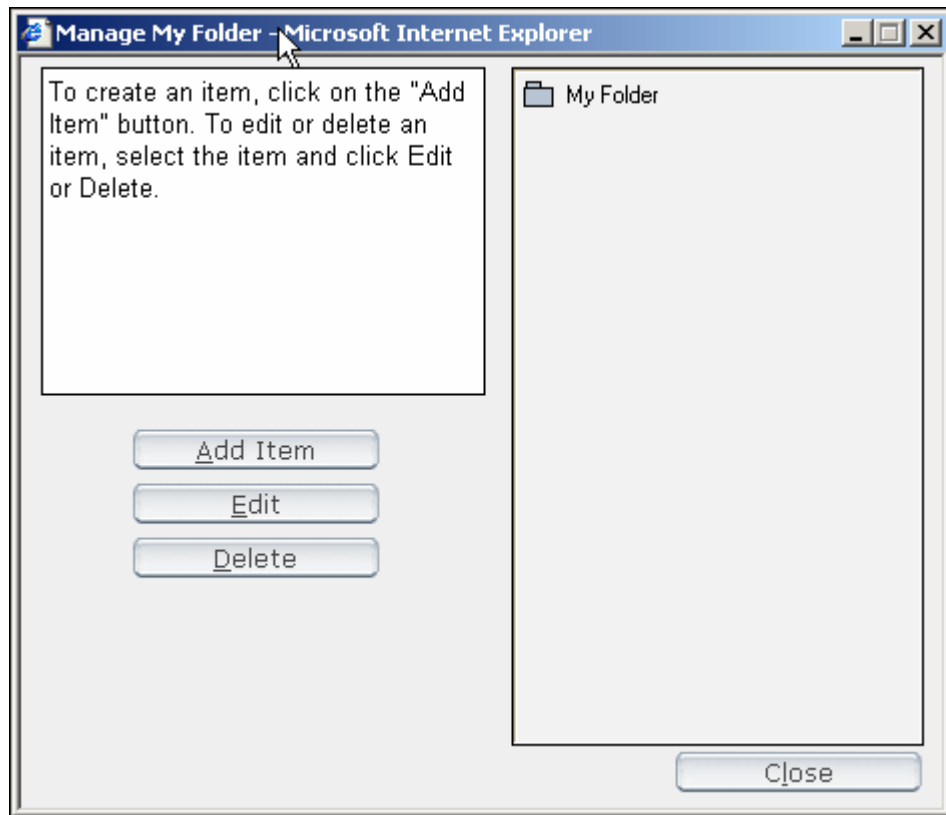
By default Manage My Folder contains a My Folder folder and an Email subfolder.

## Manage My Folder

### Adding Items

#### *To add a new item to My Folder*

1. Click the **Manage My Folder** icon  in the lower left corner of the window. The Manage My Folder window appears:



2. Click **Add Item**. The following window appears:

The screenshot shows a dialog box titled "Add Item - Microsoft Internet Explorer". It has three tabs: "Links", "Folders", and "Documents". The "Links" tab is active. Inside the dialog, there are the following fields and controls:

- Name:** A text input field.
- In Folder:** A dropdown menu currently showing "My Folder".
- ☐ **Local Link**: A checkbox.
- URL:** A text input field.
- Description:** A text area with a vertical scrollbar.
- Save**: A button.
- Close**: A button.

3. Choose a tab to begin adding items.
  - **Links** – Add internal and external hypertext links
  - **Folders** – Add subfolders for organizing reports
  - **Documents** – Add any type of document

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<b>Note</b>	In addition, you can add items by saving a report, chart, query, or alert to My Folder.
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### ***To add a new link to My Folder***

1. From Add Item, click the **Links** tab.
2. Enter a **Name** for the link.
3. For **In Folder**, select the folder or subfolder where the link will be stored.
4. Indicate whether the link is a **Local Link** or a web link.
5. Enter the **URL** for the link.
6. Add a **Description** if desired.
7. Click **Save**.

***To add a new folder to My Folder***

1. From Add Item, click the **Folders** tab.
2. Enter a **Name** for the folder.
3. For **In Folder**, select the folder or subfolder where the folder will be stored.
4. Indicate whether the item will **Allow Anonymous** access.
4. Click **Save**.

***To add a new document to My Folder***

1. From Add Item, click the **Documents** tab.
2. Enter a **Title** for the Document.
3. For **In Folder**, select the folder or subfolder where the document will be stored.
4. Select the document **Type**, such as Excel, Word, PowerPoint, or Other. Any type of file can be selected. The type indicates what icon will be used on the menu. The icon is displayed next to the type when a type is selected. If you set the type for a Word document to an Excel spreadsheet, the document will still open correctly; it will simply have an Excel icon on the menu.
5. Locate the **File**. Use the Browse button to select a file on your local machine.

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<b>Note</b>	When uploading documents it is easiest to start by selecting the File since other fields will auto-populate based on the file information. To fill this field, type the path and file name or browse to the file you wish to upload. The Title and Type will then auto-populate.
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6. Add a **Description**, if desired.
7. Click **Save**.

## Editing Items

When editing links it is important to know that all of the menu items are considered to be "links" once created in the menu and thus are all edited in the same way. The link information is displayed and can be changed. As a general rule you should not edit the URL for any items. Editing these URLs will likely cause the link to stop working. Changing the type of link has no effect other than changing the icon displayed.

1. Click the **Manage My Folder** icon.
2. Click **My Folder** to display the items that may be edited.
3. Select one of the items. The properties display in the white space.
4. Click **Edit**, and make the desired changes.
5. Click **Save**.

## Deleting Items

1. Click the **Manage My Folder** icon.
2. Click **My Folder** to display the items that may be deleted.
3. Select one of the items. The properties display in the white space.
4. Click **Delete**
5. Click **OK** to confirm.

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<b>Note</b>	Deleting a subfolder will automatically delete all the links within this folder.
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## Removing Items from the Dashboard

Links within the SwiftAnalysis panel may also be removed by clicking **Remove** to the right of a highlighted report, chart, alert or query on the Dashboard.

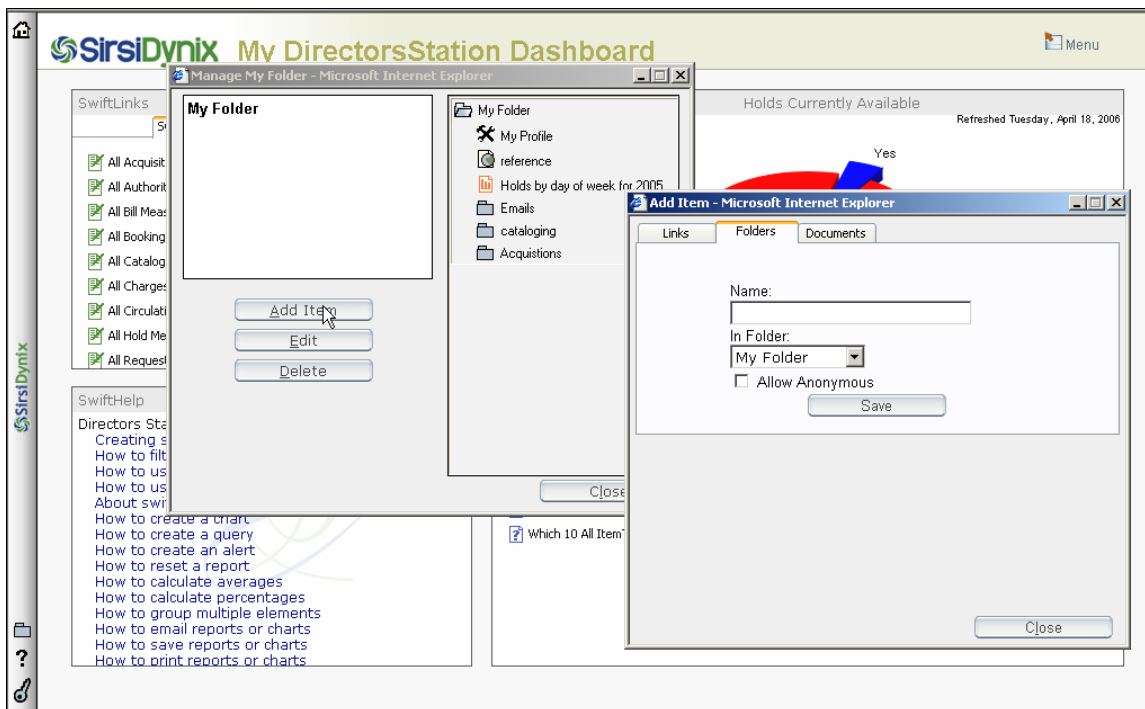
---

<b>Note</b>	Removing a link from the SwiftAnalysis panel on your Dashboard does not remove the report, chart, alert, or query from My Folder.
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## Storing Items

My Folder data can grow quickly and become unmanageable. You should use the Add Item, Folders option to develop a plan for storing your links, reports, charts, alerts and documents.



## My Profile

Use My Profile to change your e-mail address or password.

The screenshot shows the 'My Profile' form. It includes fields for 'First Name' (containing 'Library') and 'Last Name' (containing 'Director'). Below these is the 'E-Mail Address' field. A section titled 'Change Password (optional)' contains 'New Password' and 'Affirm Password' fields. At the bottom are 'Save' and 'Cancel' buttons.



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